Manage Credit Cards in the Parent Portal

Last Modified on 06/05/2019 8:44 pm EDT

Important Notes:

- To give your families the option to update credit cards in their Portal, the Parent Portal setting *Credit card information?* (*Tools > ePayment Settings > Credit Card & Bank Account Settings*) must be set to Can Update.
- If your provider supports multiple cards on file (SafeSave and C&H Financial) and you would like to offer this option to your families set Allow 3 credit cards per family/account to Yes (Tools > ePayment Settings > Credit Card & Bank Account Settings).
- If you allow parents to make payments via the Portal (seeFees & Payments Settings in the Help article Set Up the Parent Portal, the Primary Card is used when a payment is processed. If the family has more than one card on file and the parent does not want to use the card currently set as the Primary Card for a payment, they will need to reassign the status of Primary Card to the card they *do* want to use.

Add a Credit Card

- 1. Log into the Parent Portal, click on *Billing & Payments* on the Dashboard or from the right sidebar menu.
- 2. Click Saved Payment Methods under Quicklinks.
- 3. Click _ button to add a credit card.
- 4. Enter the card information. **Note:** If only one card is saved, it automatically becomes the *Primary Card* on file. If more than one is saved the parent

must choose a Primary Card.

5. Click **SAVE**. The credit card is now listed on the **Saved Payment Methods** page.

Saved Payment Methods				
Click to add a payment method.	Quickly see which card is the Primary Card.			
+	DEFAULT PRIMARY CARD Visa 8886 Visa8886 Exp: 12/2022 Holly Ager EDIT	Dad's Discover Discover1117 Exp: 05/2024 Victor Ager Click to edit an existing card on file.		

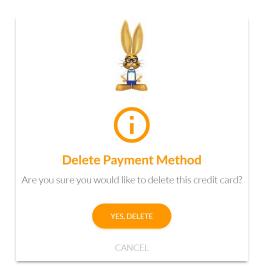
Edit a Credit/Debit Card

- 1. Log into the Parent Portal, click on *Billing & Payments* on the Dashboard or from the right sidebar menu.
- 2. Click Saved Payment Methods under Quicklinks.
- 3. Click **EDIT** to open the *Edit Credit/Debit Card* window.
- 4. Update the card as needed and click**Save**.

	Ed	it Credit	t/Debit Card
		✓ SAVE	X CANCEL
CARD INF	С	J	
Card Nickname * Dad's Discover		Make prima	ary? Click Make primary? to make this card the Default on the account.
Existing card info			
Disc	d 's Discover tover1117 Exp: (or Ager	05/2024	
Update card info			
Name on Card		Card Number	
Exp Month	Exp Year		
select	select		
Billing Address			
Address 1 123 Main Street		Address 2 Apt. 4	
City Huntersville		State NC	Zip* 28078

Delete a Credit/Debit Card

- 1. Log into the Parent Portal, click on *Billing & Payments* on the Dashboard or from the right sidebar menu.
- 2. Click Saved Payment Methods under Quicklinks.
- 3. Click **EDIT** to open the *Edit Credit/Debit Card* window.
- 4. Click the **Delete Card** button and confirm that you want to delete the card by clicking the **Yes**, **Delete** button. A confirmation will briefly display.





It is only possible for a parent to delete a credit card when they have added another card first. If a parent tries to delete the only card on the account they will see an alert advising them that they

must first add another payment method before they can delete the card.